



United Kingdom Market Profile

This summary provides the most up-to-date data available on United Kingdom as it relates to their people and economy, travel related motivations and planning behavior and U.K. visitor profile specific to Arizona.

GENERAL COUNTRY PROFILE

POPULATION:

64 million

INFLATION RATE:

1.5%

EXCHANGE RATES (GBP PER USD):

0.6003

GROSS DOMESTIC PRODUCT (GDP):

\$2.5 trillion (2.6% annual growth rate)

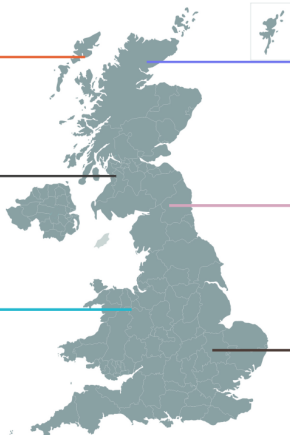
EXPORTS:

\$503 billion

UNEMPLOYMENT RATE:

6.2%

Source:
The World Fact Book, reporting 2014 data



TRAVEL MOTIVATION AND PLANNING



Top Travel Motivators

46% Cultural Historical Attractions

46% Local Lifestyle

45% Beaches/Seaside Attractions



Source used in Destination selection for last leisure trip

61% Websites via computer or laptop

33% Recommendation from family & friends

26% Information in printed travel guidebooks

24% Websites/ applications via tablet



Advance Decision Time

18% Less than a month

14% 1 to 2 months

27% 3 to 5 months

29% 6 to 12 months

9% More than 1 year



Lodging Reservation made before leaving home

81% Yes

38% Internet Booking Service*

33% The Lodging Establishment Directly

32% Travel Agency/Tour Operator/Travel Club

6% Other

19% No

* assume "Internet Booking Service" is an Online Travel Agency (OTA).



How Air Reservations were Booked

40% Directly with Airline

40% Travel Agency/Tour Operator/Travel Club

14% Internet Booking Service*

4% Corporate Travel Department

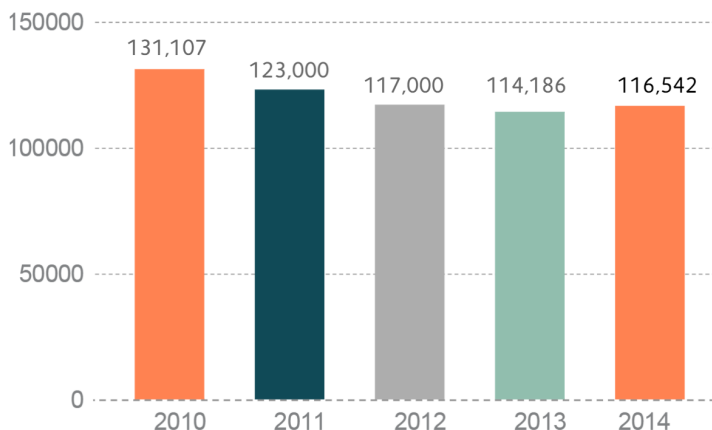
* assume "Internet Booking Service" is an Online Travel Agency (OTA).

Source:
Brand USA, reporting 2014 data
U.S. Dept. of Commerce - NTTO, reporting 2013- 14 aggregate data

U.K. VISITATION TO ARIZONA



Visitation Volume to Arizona



Visitor Characteristics

47.4 years

Average Age

\$119,912

Average Household Income

1.8 persons

Average Party Size



Length of Stay

4.5

Nights in Arizona

18.5

Nights in U.S.



Port of Entry

23%

Las Vegas, NV

17%

Los Angeles, CA

9%

Newark, NJ

8%

San Francisco, CA

3%

NY, NY



Main Purpose of Trip

94% Leisure

78% Vacation Holiday

14% Visit Friends/Relatives

1% Other

6% Business

4.1% General Business

1.9% Convention/Conference/Trade Show



Transportation in U.S.

57%

Rented Auto

45%

Auto, private or company

41%

Air travel between U.S. cities

29%

Taxicab/Limousine

21%

City subway/Tram/Bus



Visa Credit Card Travel Spending

UK's Visa Card Spending ranked #3 in 2014 with 4% of total International Travel Spending in Arizona.

By Quarter



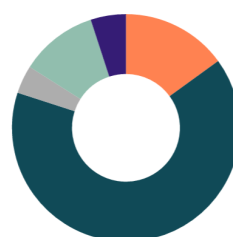
Q1: 21%

Q2: 27%

Q3: 28%

Q4: 24%

By Arizona Region



Northern: 15%

Phoenix & Central: 65%

West Coast: 4%

Tucson & Southern: 11%

North Central: 5%



Accommodations*

81%

Hotel/Motel

15%

Private Home

7%

Other

* since this is collected through a survey, there is no indication if this is paid or non-paid.

Source:

Tourism Economics, reporting 2010-2014 data

VisaVUE Travel, reporting 2014 data

U.S. Dept. of Commerce - NTTO, reporting 2013-14 aggregate data